



LABOR MARKET DIMENSIONS

JANUARY, 1991

Maryland Department of Economic and Employment Development

Office of Labor Market Analysis and Information

1100 North Eutaw Street

Baltimore, Maryland 21201

William Donald Schaefer, Governor

J. Randall Evans, Secretary

LABOR FORCE DEVELOPMENTS

After months of rising unemployment, Maryland's jobless rate leveled off in January, holding steady at 6.1 percent. While the current unemployment rate indicates tighter economic conditions when compared to last January's rate of 4.3 percent, Maryland's unemployment rate was nearly a full percentage point below the national estimate which climbed from 5.9 percent in December to 7.0 percent in January.

The stability of January's jobless rate was good news considering the upturn in 1990 which, in December, elevated Maryland's rate above the national estimate for the first time in nearly ten years. Although January's rate is the highest reading since 1984, it contrasts sharply with movements in prior recessionary years when monthly increases raised unemployment to 7.0 percent in January 1975 and 8.7 percent in January 1982.

	January 1991	December 1990	January 1990
Civilian Labor Force	2,476,241	2,489,018	2,510,921
Total Employment	2,324,150	2,338,230	2,402,724
Total Unemployment	152,091	150,788	108,197
Unemployment Rate	6.1	6.1	4.3
National Unemployment Rate	7.0	5.9	5.9

Sizeable employment reductions, often accompanied by rising levels of unemployment, are typical for January. This year's labor market movements, while following normal patterns, resulted in relatively small changes. The magnitude of these changes was, perhaps, tempered by the unusually large ups and downs during the last six months of 1990. During January, the number of workers in the state declined by 14,080 to 2,324,150. The impact of this decline on the unemployment rolls was, however, negligible because a large number of workers chose to leave the labor force. The withdrawal of an estimated 12,777 workers from the job market helped to hold down the normal January jobless increase to just 1,303 persons. Even so, January's unemployment level of 152,091 is the highest since July 1983 when about 154,611 persons were listed on the statewide unemployment rolls.

The slowdown in Maryland's economy has visibly affected labor force developments over the past year. Fewer people have jobs, the unemployment count has expanded and the number of people actually participating in the job market has declined. This labor force decline, while possibly an indication of worker discouragement, has been a major factor in helping to moderate the effects of recent job losses on the unemployment rate.

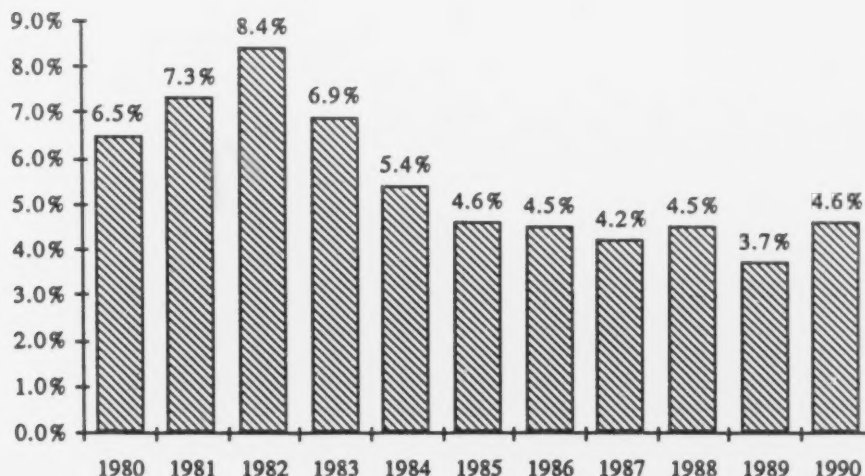
1990 REVIEW

The last half of 1990 signaled a time of economic uncertainty in Maryland. After months of dogged resistance to national economic trends, the movement in Maryland's labor force statistics during the third quarter of 1990 provided a clear indication that statewide economics were falling in line with those nationally. By the third quarter, statewide employment growth had virtually come to a standstill. The labor force, however, continued to rise—a movement which added more than 28,000 workers to the unemployment rolls and pushed joblessness up to 5.0 percent. Labor market conditions deteriorated even further during the last three months of the year. Normal seasonal increases were debilitated by a flood of unexpected layoffs, both temporary and permanent. With employment declines in excess of 79,000 and joblessness rising to 5.6 percent during the fourth quarter, the word "recession" began to creep into Maryland's economic vocabulary.

	First Quarter	Second Quarter	Third Quarter	Fourth Quarter
Civilian Labor Force	2,524,633	2,541,663	2,570,382	2,503,322
Employment	2,422,655	2,441,329	2,441,665	2,362,351
Unemployment	101,978	100,334	128,717	140,971
Unemployment Rate	4.0	4.0	5.0	5.6

Beleaguered by these developments, Maryland's job market statistics for 1990 showed a net decline of 13,000 in employment and, on the unemployment side of the ledger, a net increase of 25,000. On an annual basis, unemployment among Marylanders rose from 3.7 percent in 1989 to 4.6 percent in 1990. With the exception of a moderate increase in 1988, Maryland's jobless rate had consistently declined since peaking at 8.4 percent during the recession of 1982.

MARYLAND UNEMPLOYMENT RATES - 1980-1990



INDUSTRY DEVELOPMENTS

Maryland's economy, which began to falter under the weight of recessionary pressures during the latter part of 1990, was diminished even further during January by seasonal employment declines. Employers rolled back their payrolls by an estimated 68,800 jobs during January, with cutbacks reducing employment levels in every major industry line.

The manufacturing industry, which experienced an unexpected drop in employment during December, appeared unscathed during January since employment dropped back by a mere 300 jobs. While seasonal movements and reduced business activity did impact upon payrolls at the detailed industry level, the overall effect on manufacturing was minimized by recall activity in transportation equipment which restored approximately 2,300 jobs during January. This increase succeeded in offsetting seasonal losses in food processing and textile manufacturing and in downplaying economically-induced layoffs in lumber, stone products, primary metals and chemical products.

With production orders declining, many of Maryland's manufacturers cutback on activities by shortening workweeks. During January, the number of overtime hours worked in manufacturing was reduced by 1.2 hours, lowering the average workweek to 40.2. Reductions in overtime caused weekly paychecks to drop by more than \$8.00 to \$471.95. Trends were similar in both durable and nondurable industries, however, declines were much more pronounced in the durable goods component. In durables, working an average of 41.6 hours yielded a weekly paycheck of \$513.76 in January, down from December's estimate of \$526.96 for a 43.3 hour workweek. Shortened workweeks were reported by all durable goods producers. With the exception of the transportation equipment industry, fewer work hours resulted in smaller paychecks during January. In nondurables, the workweek dropped by 0.8 of an hour to 39.0 hours and weekly earnings fell by just under \$6.00 to \$434.46. In paper products, the only nondurable goods industry to report a lengthening in the workweek, weekly paychecks rose substantially from \$503.65 to \$530.20.

Construction, an industry which has steadily declined since August 1990, sustained additional losses during January. All told, employment in the construction trades has dropped by slightly more than 18,000 jobs since August. Nearly half of this decline occurred in January. The current downturn in construction lowered employment to 145,500, reflecting an over-the-year loss of 4,600 jobs. While some of the recent cutbacks in construction, particularly those among heavy contractors, can be tied to seasonal economics, recessionary factors have definitely hampered performance in this industry line. As has been the pattern for several months, special trade contractors posted the largest decline during January, with job losses numbering about 4,000.

Jobs in transportation, communications, and utilities dropped back by 3,700 to a level of 99,900 in January. Compared to last January, however, employment in this industry group was up by an estimated 600 jobs. Job declines, for the most part, were confined to the transportation sector. While employment declines were noted in water transportation, cutbacks in trucking and warehousing were largely responsible for the downward movement in the industry's payrolls.

The number of jobs in the trade sector contracted by 26,900 between December and January. Losses in trade extended well beyond the pre-holiday buildup, an indication that the recession has softened the employment situation in this industry. While slightly more than one-third of the employment drop off in this industry resulted from post-holiday layoffs in general merchandise and apparel stores, reductions were reported in a number of other trade industries. Within the retail component, cutbacks were noted in eating and drinking places, food stores, building material stores and among auto dealers and furniture retailers.

In finance, insurance, and real estate, seasonal layoffs, partnered with declining economics, prompted losses of about 1,000 jobs during January. Losses were restricted primarily to the finance sector, with layoffs centered in depository institutions, and to the real estate component. Employment in the insurance industry, on the other hand, rose by 100 jobs over the month.

Losses in a number of individual services industries pulled down employment in this sector by slightly more than 15,000 jobs between December and January. Semester breaks at private colleges and universities caused employment in educational services to drop back by an estimated 3,100 jobs. A like decline was noted in business services, with computer and data processing firms showing the largest losses. Elsewhere in services, job reductions, of note, also occurred in hotels, amusements and agricultural services.

Employment trends in the public sector during January, were, for the most part, dominated by semester break activity at educational facilities. State government lost 3,400 jobs, 98 percent of which were tied to temporary layoffs in education. Losses were deeper in local government where layoffs by boards of education, community colleges and local government agencies reduced employment by some 7,900 jobs over the month.

MARYLAND
NONAGRICULTURAL PAYROLL EMPLOYMENT* BY INDUSTRY
BY PLACE OF EMPLOYMENT
(IN THOUSANDS)
JANUARY 1991

Industry	January 1991	December 1990	January 1990
TOTAL NONAGRICULTURAL EMPLOYMENT	2,123.2	2,192.0	2,116.4
Goods Producing	349.8	359.1	356.4
Mining	1.9	2.0	1.9
Construction	145.5	154.4	150.1
Heavy Construction	15.0	18.2	15.3
Manufacturing	202.4	202.7	204.4
Durable Goods	106.3	104.9	107.9
Lumber & Wood Products	3.9	4.1	3.9
Stone, Clay, & Glass Products	8.0	8.3	8.3
Concrete, Gypsum, Plaster	5.0	5.3	5.2
Other Stone, Clay, & Glass	3.0	3.0	3.1
Primary Metal Industries	10.8	11.0	10.7
Blast Furnaces	9.0	9.2	9.0
Fabricated Metal Products	9.9	10.0	9.8
Fabricated Structural Metal Products	4.1	4.2	4.2
Other Fabricated Metal Products	4.7	4.7	4.6
Industrial Machinery	15.7	15.7	17.1
Refrigeration & Service Mach.	1.9	1.9	2.5
Other Industrial Machinery & Equipment	9.5	9.5	10.0
Electronic Equipment	15.2	15.2	16.9
Communications Equipment	4.5	4.5	4.5
Electronic Component	3.7	3.7	4.6
Other Electronic Equipment	7.0	7.0	7.8
Transportation Equipment	13.3	11.0	11.3
Motor Vehicles	5.4	3.1	2.5
Other Transportation	3.2	3.3	3.4
Instruments & Related	24.0	24.0	24.4
Miscellaneous Manufacturing	2.7	2.7	2.7
Nondurable Goods	96.1	97.8	96.5
Food & Kindred Products	24.1	25.0	24.1
Meat Products	5.9	6.0	5.8
Beverages	4.1	4.4	4.1
Other Food & Kindred	9.5	9.8	9.7
Textile Mill, Apparel	9.9	10.2	9.9
Paper & Allied Products	9.6	9.7	9.3
Printing & Publishing	28.3	28.4	28.8
Chemicals and Allied Products	13.7	13.9	13.8
Rubber & Miscellaneous	8.4	8.5	8.4
Other Nondurable Goods	2.1	2.1	2.2

Industry	January 1991	December 1990	January 1990
Service Producing	1,773.4	1,832.9	1,760.0
Transportation & Public Utilities	99.9	103.6	99.3
Transportation	55.7	59.3	55.3
Railroad Transportation	4.4	4.5	4.6
Trucking & Warehousing	28.4	31.1	27.9
Communications & Utilities	44.2	44.3	44.0
Communications	27.9	27.9	27.9
Electric, Gas, Sanitary	16.3	16.4	16.1
Trade	518.3	545.2	521.5
Wholesale Trade	108.4	110.1	108.4
Retail Trade	409.9	435.1	413.1
Building Materials, Garden Supplies	16.1	17.4	16.4
General Merchandise	46.8	53.7	47.4
Food Stores	66.6	68.9	65.4
Eating & Drinking Places	124.5	130.5	125.9
Finance, Insurance, & Real Estate	130.7	131.7	129.8
Finance	58.1	58.7	58.6
Depository Institutions	42.6	43.1	42.9
Commercial Banks	27.4	27.8	27.7
Insurance	38.8	38.7	37.7
Insurance Carriers	25.8	25.6	24.9
Real Estate	33.8	34.3	33.5
Services	610.6	625.7	598.0
Business Services	132.3	135.4	131.6
Health Services	161.4	162.0	153.9
Hospitals	79.6	79.6	75.4
Legal Services	15.9	16.1	15.7
Educational Services	33.7	36.8	33.1
Private Colleges, Universities	16.3	19.4	15.8
Total Government	413.9	426.7	411.4
Total Federal Government	131.9	133.4	133.1
Department of Defense	46.3	47.7	47.1
Other Federal Government	85.6	85.7	86.0
Total State & Local Government	282.0	293.3	278.3
Total State Government	96.0	99.4	95.3
State Education	29.5	32.8	29.4
Other State Government	66.5	66.6	65.9
Total Local Government	186.0	193.9	183.0
Local Education	110.8	117.3	109.4
Other Local Government	75.2	76.6	73.6

*The count is of jobs, not workers. It includes full and part-time wage earners employed during pay period including the 12th of the month.

NOTE: Figures may not add to totals due to rounding.

Current data preliminary; previous month revised.

Prepared in conjunction with the U.S. Department of Labor, Bureau of Labor Statistics.

HOURS AND EARNINGS OF PRODUCTION WORKERS IN SELECTED MANUFACTURING INDUSTRIES

JANUARY 1991

Industry	AVERAGE WEEKLY HOURS		AVERAGE WEEKLY EARNINGS		AVERAGE HOURLY EARNINGS	
	January 1991	December 1990	January 1991	December 1990	January 1991	December 1990
MARYLAND						
Manufacturing	40.2	41.4	\$471.95	\$480.24	\$11.74	\$11.60
Durable Goods	41.6	43.3	513.76	526.96	12.35	12.17
Lumber and Wood Products	38.8	39.9	345.32	363.09	8.90	9.10
Stone, Clay, and Glass Products	40.3	44.8	459.42	502.21	11.40	11.21
Primary Metal Industries	42.6	43.2	671.38	675.22	15.76	15.63
Blast Furnaces	43.3	43.6	686.31	688.44	15.85	15.79
Fabricated Metals	42.1	43.3	450.47	465.48	10.70	10.75
Industrial Machinery	40.5	43.2	506.25	543.46	12.50	12.58
Electronic Equipment	45.3	46.0	422.20	432.86	9.32	9.41
Transportation Equipment	39.5	41.0	613.04	599.83	15.52	14.63
Instruments and Related Products	43.1	44.7	581.85	628.04	13.50	14.05
Miscellaneous Manufacturing Industries	40.5	41.7	382.73	408.66	9.45	9.80
Nondurable Goods	39.0	39.8	434.46	440.19	11.14	11.06
Food and Kindred Products	39.4	40.5	399.52	413.10	10.14	10.20
Textile Mill, Apparel	34.0	36.5	255.00	277.40	7.50	7.60
Paper and Allied Products	44.0	42.9	530.20	503.65	12.05	11.74
Printing and Publishing	36.0	36.5	482.40	483.63	13.40	13.25
Chemicals and Allied Products	42.0	42.6	531.30	532.50	12.65	12.50
Rubber and Plastic Products	43.0	43.8	425.70	437.56	9.90	9.99
BALTIMORE METROPOLITAN AREA						
Manufacturing	40.5	41.9	\$494.10	\$504.06	\$12.20	\$12.03
Durable Goods	41.1	42.8	533.48	542.70	12.98	12.68
Nondurable Goods	39.8	41.0	450.93	466.17	11.33	11.37

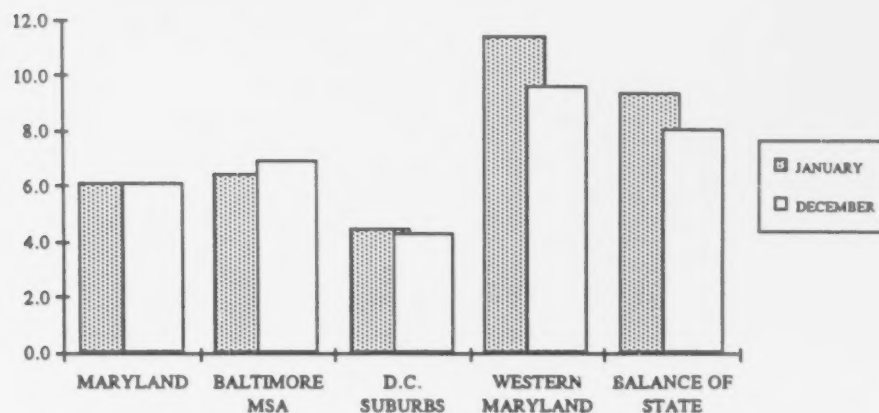
BALANCE OF STATE

Joblessness on the Eastern Shore and in Southern Maryland left 9.4 percent of the labor force, or an estimated 19,332 persons, without a job in January, up from 8.1 percent in December. Seasonal fluctuations, exaggerated by the current economic slowdown, were apparent throughout the region where unemployment rates in January ranged from a low of 5.9 percent in St. Mary's County to a high of 17.2 percent in Worcester County. Aside from Worcester, double digit jobless rates were reported in Cecil, Dorchester and Somerset. In Cecil, furloughs in Delaware's auto industry clouded the county's economic picture. In the remaining shore counties, unemployment increases were primarily seasonal, with declines in agribusiness and related food processing businesses causing local labor market conditions to slide.

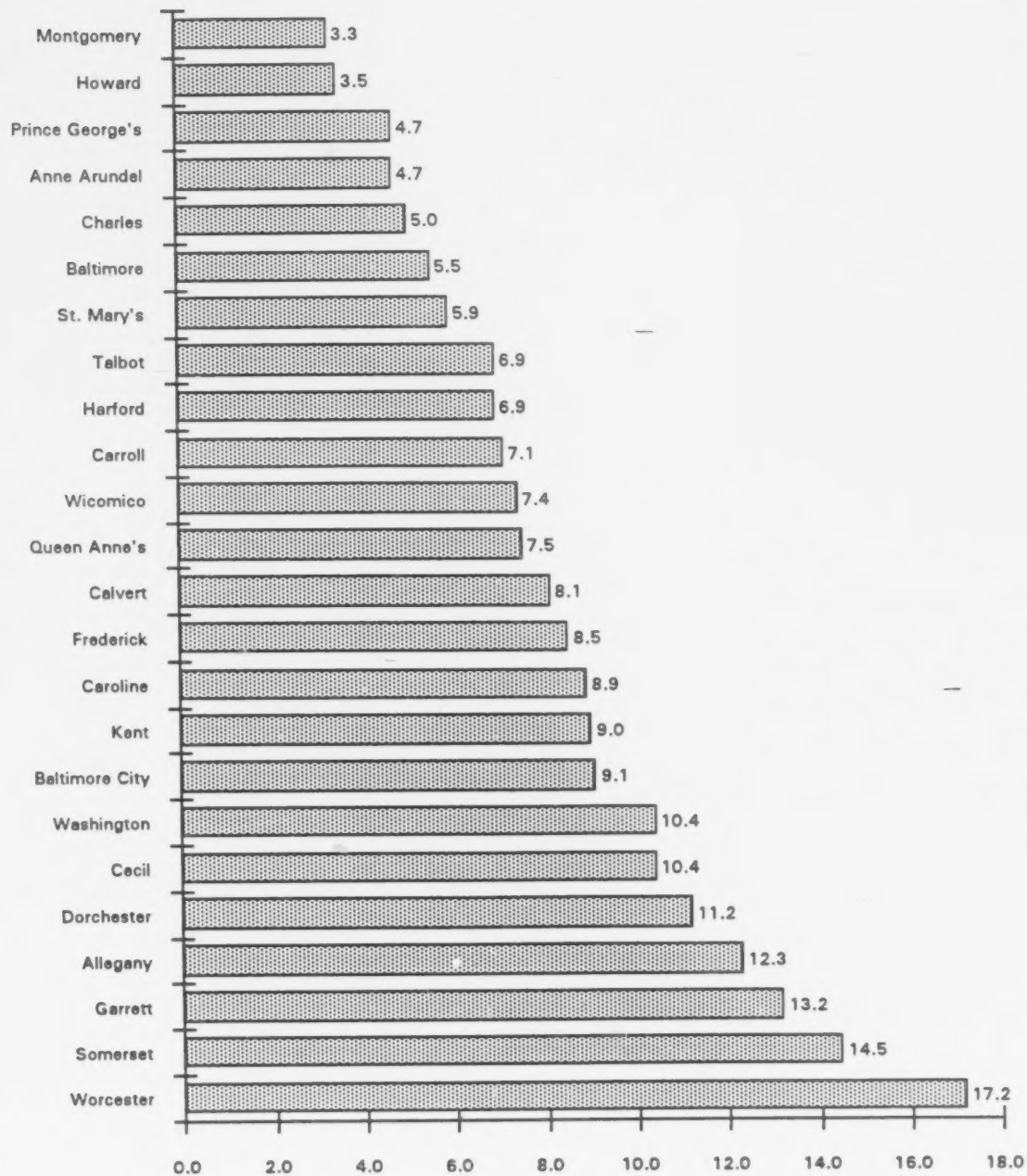
TOTAL UNEMPLOYMENT - MARYLAND AND REGIONS

	JANUARY 1991		DECEMBER 1990	
	NUMBER	RATE	NUMBER	RATE
MARYLAND	152,091	6.1	150,788	6.1
BALTIMORE METROPOLITAN AREA	76,280	6.4	82,115	6.9
MARYLAND'S D.C. SUBURBS	44,134	4.5	41,792	4.3
WESTERN MARYLAND	12,344	11.4	10,198	9.6
BALANCE OF STATE	19,332	9.4	16,683	8.1

UNEMPLOYMENT RATES - JANUARY 1991



LOCAL UNEMPLOYMENT RATES-JANUARY 1991



STATE OF MARYLAND
CIVILIAN LABOR FORCE, EMPLOYMENT, AND UNEMPLOYMENT
BY PLACE OF RESIDENCE
JANUARY 1991

AREA	CIVILIAN LABOR FORCE		EMPLOYMENT		UNEMPLOYMENT		UNEMPLOYMENT RATE		
	JANUARY	DECEMBER*	JANUARY	DECEMBER*	JANUARY	DECEMBER*	JANUARY	DECEMBER*	JAN. 1990
MARYLAND	2,476,241	2,489,018	2,324,150	2,338,230	152,091	150,788	6.1	6.1	4.3
BALTIMORE METROPOLITAN AREA	1,183,149	1,194,987	1,106,869	1,112,872	76,280	82,115	6.4	6.9	4.7
BALTIMORE CITY	337,653	342,975	307,068	308,733	30,585	34,242	9.1	10.0	7.0
ANNE ARUNDEL	209,797	211,590	199,945	201,029	9,852	10,561	4.7	5.0	2.9
BALTIMORE	382,666	386,724	361,470	363,431	21,196	23,293	5.5	6.0	4.2
CARROLL	63,169	62,679	58,664	58,982	4,505	3,697	7.1	5.9	4.0
HARFORD	82,621	82,907	76,883	77,300	5,738	5,607	6.9	6.8	6.2
HOWARD	91,239	92,315	88,040	88,518	3,199	3,797	3.5	4.1	1.9
QUEEN ANNE'S	16,002	15,797	14,799	14,879	1,203	918	7.5	5.8	4.5
D. C. AREA	978,260	980,523	934,126	939,131	44,134	41,792	4.5	4.3	2.8
CALVERT	23,597	23,229	21,690	21,807	1,907	1,422	8.1	6.1	4.6
CHARLES	46,847	46,796	44,502	44,740	2,345	2,056	5.0	4.4	2.8
FREDERICK	78,551	77,468	71,890	72,276	6,661	5,192	8.5	6.7	4.7
MONTGOMERY	417,091	419,412	403,309	405,470	13,782	13,942	3.3	3.3	2.1
PRINCE GEORGE'S	412,173	414,020	392,735	394,839	19,438	19,181	4.7	4.6	3.1
WESTERN MARYLAND	108,717	106,527	96,373	96,329	12,344	10,198	11.4	9.6	8.2
ALLEGANY	33,279	32,393	29,192	29,093	4,087	3,300	12.3	10.2	9.8
GARRETT	13,766	13,703	11,948	12,195	1,818	1,508	13.2	11.0	9.7
WASHINGTON	61,672	60,431	55,233	55,041	6,439	5,390	10.4	8.9	7.0
BALANCE OF STATE	206,114	206,581	186,782	190,898	19,332	16,683	9.4	8.1	7.1
CAROLINE	13,908	13,710	12,676	12,873	1,232	837	8.9	6.1	5.5
CECIL	36,436	34,973	32,655	32,335	3,781	2,638	10.4	7.5	9.5
DORCHESTER	17,350	16,856	15,414	16,346	1,936	1,510	11.2	9.0	8.4
KENT	8,841	8,856	8,044	8,334	797	522	9.0	5.9	6.5
ST. MARY'S	42,040	42,961	39,566	40,642	2,474	2,319	5.9	5.4	3.9
SOMERSET	12,117	12,837	10,356	11,055	1,761	1,782	14.5	13.9	10.6
TALBOT	17,327	17,788	16,138	16,641	1,189	1,147	6.9	6.4	4.9
WICOMICO	39,276	39,360	36,353	36,465	2,923	2,895	7.4	7.4	5.4
WORCESTER	18,819	19,240	15,580	16,207	3,239	3,033	17.2	15.8	13.3
UNITED STATES**	123,585,000	124,630,000	114,990,000	117,287,000	8,595,000	7,343,000	7.0	5.9	5.9

*Estimates for the state are revised.

**Source: U. S. Department of Labor, Bureau of Labor Statistics

NOTE: Figures may not add due to rounding. These are estimates relating to the week of the 12th of each month. The count is of persons not jobs. All data are not seasonally adjusted.

NONAGRICULTURAL PAYROLL EMPLOYMENT* BY INDUSTRY--BY PLACE OF EMPLOYMENT
(IN THOUSANDS)
BY REGION--JANUARY 1991

Industry	BALTIMORE METROPOLITAN AREA		MARYLAND PORTION D.C. SUBURBS		WESTERN MARYLAND		BALANCE OF STATE	
	January 1991	December 1990	January 1991	December 1990	January 1991	December 1990	January 1991	December 1990
Total Nonagricultural Employment	1,126.7	1,160.4	764.4	789.1	92.1	94.5	135.0	140.8
Goods Producing	196.3	200.9	98.8	101.9	21.7	22.4	32.0	33.5
Mining	0.5	0.5	0.5	0.5	0.7	0.7	0.2	0.2
Construction	67.8	73.5	62.7	65.5	5.3	5.7	8.9	9.8
Manufacturing	128.0	126.9	35.6	35.9	15.7	16.0	22.9	23.5
Durable Goods	71.9	69.9	17.8	17.8	7.3	7.3	8.9	9.0
Nondurable Goods	56.1	57.0	17.8	18.1	8.4	8.7	14.0	14.5
Service Producing	930.4	959.5	665.6	687.2	70.4	72.1	103.0	107.3
Transportation & Public Utilities	54.8	56.3	33.0	34.4	5.1	5.2	7.4	7.4
Trade	262.9	274.9	197.1	206.5	26.1	26.9	32.8	35.5
Wholesale Trade	62.6	63.6	35.3	35.5	5.0	5.1	5.1	5.3
Retail Trade	200.3	211.3	161.8	171.0	21.1	21.8	27.7	30.2
Finance, Insurance, & Real Estate	75.4	75.8	46.2	46.7	3.1	3.2	5.0	4.8
Services	325.1	333.6	231.1	235.1	21.3	21.6	32.3	32.9
Total Government	212.2	218.9	158.2	164.5	14.8	15.2	25.5	26.7
Federal	50.0	51.5	71.6	72.2	1.8	1.8	6.8	6.8
State	71.0	71.8	16.3	17.8	4.9	4.9	5.1	5.8
Local	91.2	95.6	70.3	74.5	8.1	8.5	13.6	14.1

*The count is of jobs, not workers. It includes full and part-time wage earners employed during pay period including the 12th of the month.

NOTE: Figures may not add to totals due to rounding.

Additional industry detail available upon request. Current data preliminary; previous month revised.

Prepared in conjunction with the U.S. Department of Labor, Bureau of Labor Statistics.

UNEMPLOYMENT COMPENSATION

	January 1991	December 1990	January 1990
Initial Claims	51,976	38,471	36,834
Weeks Claimed	313,108	226,647	231,153
First Payments	26,322	13,498	23,130
Final Payments	3,176	2,603	2,098
Weeks Paid	242,305	164,147	213,264
Net Benefit Amount	\$42,728,067	\$28,544,895	\$30,271,001
Average Check Amount	\$176.34	\$173.90	\$141.94

In January, for the second consecutive month, a marked increase was noted in the filings of both initial claims and weeks claimed in the regular unemployment insurance program. While some of this increase can be attributed to seasonality and the recent economic slowdown, January's upturn also reflects the rise in activity associated with quarterly changes in base year determinations.

During January, initial claims rose by slightly more than 35.0 percent, numbering just under 52,000, while weeks claimed increased by a greater 38.2 percent from 226,647 in December to 313,108 in January. Compared with a year ago, initial claims in January were up by 41.1 percent, or 15,142, and weeks claimed were about 35.5 percent above 1990 totals.

For the eighth straight month, the ratio of weeks paid to weeks claimed continued in the 70 percent range, with the ratio increasing from 72.4 percent in December to 77.4 percent in January. Just under 11.0 percent of all weeks paid during January represented first pays, up from 8.2 percent in December while the share of final pays declined somewhat over the month from 1.6 percent to 1.3 percent. During January, the ratio of first pays to total weeks paid was highest in the Western Region while the local offices in the Baltimore Metropolitan Area experienced the highest percentage of final pays.

Statewide, the average check amount rose from \$173.90 to \$176.34, an increase which when coupled with the surge in weeks paid resulted in a net benefit outlay of about \$42.7 million in January. Regionally, the average check amount in January ranged from a high of \$188.70 in the D.C. Area suburbs to a low of \$153.38 paid on claims filed in the Eastern Shore and Southern Maryland areas.



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Employment Development

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